LEGAL SERVICES PROJECTS AND SUPPORT CENTERS
Electronic EAF Budget Forms Instructions

> **Read the following instructions carefully before you begin to fill out the EAF budget forms. Refer to the "INSTRUCTIONS" for definitions and explanations of specific questions or line items. If you have questions, contact the Trust Fund Office.**

1. **SAVE A COPY OF THESE FORMS:** You will want a "clean" copy in case you need to start over or need to make extra copies for multi-county programs. From the "File" menu, choose "Save As" and save a copy of these forms to your computer. Data entered directly on the web pages containing the documents will not be saved to the Web site. Completed forms must be saved to your computer.

2. **TO USE THE FORMS:**

   a. **WORD forms – A, D and E (E is for LSPs only):**

   - Sections that require "fill-in-the-blank" answers have gray "boxes" and are "protected" – you will not be able to put your cursor anywhere but the boxes or the "checkboxes" for "checkmark" answers. Use the tab or arrow keys or your mouse to move between boxes. Areas that require narrative answers are "unprotected" and you can type as much information as you may consider necessary. Use the "down arrow" key to move from the bottom of a narrative answer to the next answer space.
   - **Save often!**

   b. **EXCEL forms – B and C:**

   - **Finding the forms:** Each form is a separate worksheet within the Excel spreadsheet. Move from form to form by clicking on the corresponding tab at the bottom of the screen. (The tabs resemble file folder tabs.)
   - **Enter data:** You can input information into the non-shaded cells only. Use the mouse or arrow keys to place the cursor in the cell in which you will enter data. After you have entered data, press the "Enter" key. (All the BLUE cells are "protected" and you cannot input any information into them. Many of the BLUE cells have built-in formulas and will automatically calculate the totals.)
   - **Editing:** To make corrections, place your cursor in the cell containing the data to be corrected and double-click to access "editing" mode. Make the corrections and then press the "Enter" key.
   - **Save often!**

   c. **Special information for multi-county programs:**

   - **Make a sheet for each county you serve:** Right-click on the "Form C" "tab" at the lower-left-hand corner of the screen. Choose "Move or Copy", choose "Move to End", and then click the "Create a Copy" option. This will create a new worksheet named "Form C(2)"; it may be helpful to rename each worksheet as the county to which it corresponds.
   - **Print a hard copy:** If you use the print icon, only the form that you are currently viewing will print. To print all the forms (worksheets) at once, select "Print" from the "File" menu. Then, in the "Print What?" section of the Print dialog box, choose "Entire Workbook". (Note: Some printers may not print all forms correctly when you choose this option, you may have to print each form individually.)
   - **Save often!**

If you need assistance downloading or copying these forms, please contact us at 415-538-2252 or trustfundprogram@calbar.ca.gov.